

1 Lauren Herzog Trust

Case No. 09CEPR00542

Atty Barron, Richard B. (for Perine & Dicken Professional Fiduciaries and Conservators)

Probate Status Hearing Re: Status on Informal Accounting

	PERINE & DICKEN PROFESSIONAL FIDUCIARIES,	NEEDS/PROBLEMS/ COMMENTS:
	former Trustees, filed its Fourth Account	
	covering through 4/30/14, and a Petition to	
	Terminate the Trust that was heard by this	
	court on 09/16/14.	
Cont. from		
Aff.Sub.Wit.	The Trustee's Fourth Account was settled	
Verified	9/16/14, and the Petition to Terminate the Trust,	
Inventory	was granted concurrently. Order Authorizing	
PTC	Termination of Trust (Revised) Filed 9/17/14	
Not.Cred.	directed assignment of all future rights to	
Notice of Hrg	receive payments under the annuities to	
Aff.Mail	Lauren Herzog, and authorized the trustee to	
Aff.Pub.	retain a reserve of \$5,000.00 to discharge final	
Sp.Ntc.	debts, taxes and administrative costs owed by	
Pers.Serv.	the trust.	
Conf. Screen	The court ordered an informal accounting of	
Letters	the \$5,000.00 reserve be filed and set status	
Duties/Supp	hearing for 3/24/15. The informal accounting	
Objections	was to be filed without triggering a hearing	
Video Receipt	unless the court set a hearing upon review.	
CI Report	No informal accounting was filed, and there	
9202	were no appearances on 3/24/15. Therefore,	
Order	the Court issued this OSC to Richard Barron	
Aff. Posting	and Perine & Dicken Professional Fiduciaries as	
Status Rpt	to why they should not be sanctioned for	
UCCJEA	failure to appear and failure to file the informal	
Citation	accounting. The stated parties are ordered to	
FTB Notice	be personally present or appear via Courtcall	
	on 5/5/15.	
	On 4/20/15, Petition for Approval of Trustee's	
	Supplemental Account Current, for Approval of	
	Trustee's Fees and for Authorization to	
	Compensate Counsel for the Trustee and for	
	Final Distribution of Trust Assets was filed and	
	set for hearing on 6/8/15.	

Reviewed by: skc
Reviewed on: 4/30/15
Updates:
Recommendation:
File 2 - Herzog

Amended Petition for Approval of Second and Final Account and Report of Conservator of the Person and Estate; Request for Payment of Conservator's Attorney; Request of Authorization to Distribute Assets to Administrator of the Estate and Named Beneficiaries; and Discharge Conservator of the Estate.
Probate Code 2620

DOD: 1/1/14		CRAIG MACGLASHAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 6/1/11 – 1/1/14	<ol style="list-style-type: none"> Billing statement for the First and Final Account listed the paralegal rate at \$60.00 per hour. This amended petition lists the paralegal rate at \$100.00 for the same billing period. This amounts to a difference of \$1,052.00 in fees. Need clarification. Prior billing statement did not include a charge for the attorney in the amount of \$84.00 on 9/17/12 however it is listed in the billing statement attached to the amended account. Need clarification. Prior billing statement had the paralegal preparing the order (\$24.00 charged) on 12/31/14. The billing statement attached to the amended account shows the attorney preparing the order (\$112.00 charged). Need clarification.
Cont. from 040715		Accounting - \$2,037,282.39	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$1,661,989.40	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$1,589,045.76	
<input type="checkbox"/>	Inventory	Conservator - waives	
<input type="checkbox"/>	PTC	Attorney - \$13,352.00	
<input type="checkbox"/>	Not.Cred.	(65.30 hours of paralegal and attorney time at \$100 - \$280 per hour.)	
<input type="checkbox"/>	Notice of Hrg	Costs - \$435.00 (filing fee)	
<input type="checkbox"/>	Aff.Mail	N/A	
<input type="checkbox"/>	Aff.Pub.	Petitioner states the conservatee died on 1/1/14. Petitioner has been appointed as executor of the estate of Jamie McGlashan.	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp	Petitioner prays for an Order:	
<input type="checkbox"/>	Objections	1. Approving, allowing and settling the second and final account and report of conservator;	
<input type="checkbox"/>	Video Receipt	2. All acts and transactions of Conservator as set forth in the accounting are ratified, confirmed and approved;	
<input type="checkbox"/>	CI Report	3. Authorizing the payment of attorney fees and costs;	
<input checked="" type="checkbox"/>	9202 Order	4. Transfer of the remaining property on hand to Craig MacGlashan as executor of the estate of Jamin McGlashan and to Craig MacGlashan as joint owner of the Farmers Insurance Group Federal Credit Union Account.	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: KT**Reviewed on: 4/30/15****Updates:****Recommendation:****File 2 - McGlashan**

3 Wanda H. Bingham (CONS/PE) Case No. 11CEPR00949

Attorney Roberts, David A.

Petition for Order Awarding Attorneys Fees

		NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Continued to 6/2/15 Per Attorney request
		Reviewed by: skc
		Reviewed on: 4/30/15
		Updates:
		Recommendation:
		File 3 - Bingham

Petitioner: Irene Jimenez (pro per)

Petitioner: Cutberto Jimenez (pro per)

Petition for Appointment of Temporary Guardian of the Person

Age: 12 years	GENERAL HEARING 5/21/15	NEEDS/PROBLEMS/COMMENTS:
	IRENE JIMENEZ and CUTBURTO JIMENEZ , non-relatives (they are the paternal aunt and uncle of this minor's sibling Natalie Ortega) are petitioners.	This petition is for <u>VANITY SALDIVAR</u> only. Petitioners were appointed guardian of Vanity's sibling, Natalie Ortega, on 3/25/15.
Cont. from	Father: RUSTY LEE SALDIVAR	A competing Petition for Guardianship of Vanity Saldivar has been filed by her paternal grandparents, Richard Saldivar and Rosalinda Saldivar. The hearing on the competing petition is set for 6/29/15.
<input type="checkbox"/> Aff.Sub.Wit.	Mother: AMBER STICKLES – <i>consents and waives notice.</i>	1. UCCJEA does not list the minor's residence information for the past 5 years.
<input checked="" type="checkbox"/> Verified	Paternal grandfather: Richard Saldivar Paternal grandmother: Rosalinda Saldivar	2. Proof of service on the father, Rusty Saldivar is insufficient. It does not include what documents were service and the Notice of Hearing does not include the date, time and department of the hearing.
<input type="checkbox"/> Inventory	Maternal grandfather: Not listed. Maternal grandmother: Tanya Sharp – <i>consents and waives notice.</i>	3. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition or consent and waiver of notice on: a. Vanity Saldivar (minor)
<input type="checkbox"/> PTC	Petitioners state the minor was in their care and going to school since January 2015. They let her go visit her grandmother and she didn't bring her home because she threw a fit to her grandmother. She was grounded from running away from their home and not getting her way. Petitioners state their main concern is that they want her to continue to go to school. Another concern is that she is being bounced around from house to house.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 4/30/15
		Updates:
		Recommendation:
		File 4 – Ortega & Saldivar

Determination of Attorney's Fees and Costs

DOD: 2-16-09	GREGORY L. TAYLOR was appointed Administrator with Will Annexed with Limited IAEA without bond on 1-23-14. Letters issued 2-3-14. This status hearing for the filing of the first account or petition for final distribution was set at the hearing on 1-23-14.	NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.	The Administrator's First and Final Account was filed 6-5-14. Objections were filed by Diane Elizabeth Taylor on 6-26-14.	Note: Memorandum of Costs totaling \$27,315.38 was filed 4/20/15. Please see Page 2.
Verified		
Inventory		
PTC		
Not.Cred.	Order Approving First and Final Report of Administrator filed 7-11-14 ordered that the estate be brought to a close except for the matters of the Objector's to be filed petition for attorneys' fees and costs required to have the 2006 codicil admitted to probate, surcharge of the Objector, and responsive pleadings thereto. The Minute Order of 7-11-14 also set the matter for Settlement Conference/Court Trial.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Status Report filed 3-10-15 states: The Order of 7-11-14 approved the account, reserving \$15,000.00 of the corpus and \$10,000.00 of Ms. Taylor's share to be held in the blocked account. The order provided for statutory and extraordinary fees to the Administrator's attorney and distribution except for the reserved amounts. The Court directed Administrator's attorney to file a petition to surcharge the Objector's share. The Order for Withdrawal of Funds for pro rata distribution and attorneys' fees was filed 7-23-14.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	Administrator filed a Petition for Surcharge of Objector Diane Taylor's Testate Share of the Estate on 8-8-14 and the matter was confirmed for trial. Objector Diane Taylor filed a Petition to Approve Attorney's Fees and Costs on 8-15-14. Objection and replies were timely filed.	Reviewed by: skc
Aff. Posting		Reviewed on: 4/30/15
Status Rpt		Updates:
UCCJEA		Recommendation:
Citation	On 11-4-14, after reviewing Judge Oliver's Order of Final Distribution signed 7-11-14, the Court found that the ONLY issue remaining was for Objector to file a memorandum of her costs. Attorney McCloskey, on behalf of the estate, filed his request to surcharge such fees, along with a declaration. The Court could find nowhere in the order where further evidence was to be admitted beyond what was noted above. Respondent agreed that there was no need for further evidence, and counsel for Objector did not provide any legal basis for an evidentiary hearing. As such, the Court ordered that no further evidence need be taken on this limited issue; the matter is returned to the Probate Court for a ruling on the attorney fee and cost issue.	File 3 - Taylor
FTB Notice	On 3-20-15, the Court admonished the parties to follow the previous orders of the Court and ordered Memorandum of Costs to be filed by 4/20/15.	

Page 2**Memorandum of costs totaling \$27,315.38 includes:**

- \$2,280.00 in filing and motion fees
- \$307.71 for service of process
- \$75 witness fees
- \$23,011.50 attorney fees
- \$606.17 for Models, blowups, and photocopies of exhibits
- \$1,035.00 Court reporter fees

Examiner notes the following for Court review:

1. \$105.00 is noted for filing and motion fees with reference to a status report on 10/24/13; however, Court records do not reflect a payment of that amount on that date. Please note that runner fees are considered a cost of doing business and not reimbursable per Local Rule 7.17.B.
2. \$435.00 for filing this Memorandum of Costs is noted for filing and motion fees; however, this Memorandum of Costs was not charged a filing fee.

(Therefore, \$440.00 may be deducted from the \$2,280.00 in filing and motion fees.)

Notice of Motion and Motion to be Relieved as Counsel

DOD: 6-12-07		CATHERINE A. AMADOR , Attorney for Former Administrator KIM MARIE GALLO , is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 020415, 030315			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order	<p>Petitioner's Declaration in Support of Motion to be Relieved as Counsel states she is an associate of Pascuzzi, Pascuzzi & Stoker, attorneys of record for Kim Marie Gallo, the duly appointed administrator of the estate. Ms. Amador prepared and filed the petition for appointment of Ms. Gallo as administrator of the estate of Pauline Sidam, who had been Ms. Gallo's mother-in-law. Ms. Gallo was appointed 9-11-13 and Letters issued. Ms. Gallo was given full IAEA powers.</p> <p>The Inventory and Appraisal filed 10-4-13 consisted of a single asset, a single family residence in Fresno. Ms. Gallo exercised her IAEA authority and sold the house in April 2014.</p> <p>Prior to the sale, Ms. Gallo had informed Ms. Amador that she and her disabled son had decided to move to Minnesota to reside with her sister. She provided an address and stated that she could be reached at her current cell phone number.</p> <p>Ms. Amador had provided Ms. Gallo with necessary documents and information to open an estate account to receive proceeds from the sale of the residence and instructions on how to handle the escrow in March 2014. Ms. Amador wrote to Ms. Gallo in April and May requesting information on the estate, and attempted to call, but the cell phone number had been disconnected. Ms. Amador wrote again in December following the status conference where she had been ordered to file the final report no later than 1-5-15, but no reply has been received.</p> <p>To the best of Ms. Amador's knowledge, the address for Ms. Gallo in Minnesota is a valid address. None of the letters have been returned undeliverable. Even if she no longer resides there, it is expected that her sister would forward her mail.</p> <p>The attorney respectfully requests to be relieved as counsel of record for Ms. Gallo. She does not respond to efforts to contact her, and the attorney is unable to complete estate administration without her cooperation.</p>	<p>Note: On 1-7-15, the Court removed Kim Marie Gallo as Administrator and appointed the Public Administrator.</p> <p>Note: On 3-3-15, the attorney was directed to address the following issues:</p> <ol style="list-style-type: none"> 1. Petitioner filed "Proof of Service by First-Class Mail – Civil" Form POS-030 rather than the mandatory "Notice of Hearing – Probate" Form DE-120, which contains mandatory language regarding the hearing date and place pursuant to Probate Code §1211. The Court may require further service. 2. According to the Declaration, the attorney was aware of the Administrator's removal of her residence from California to Minnesota, and her permanent address there, in March of 2014. However, no change of address was not filed with the Court or served on interested persons pursuant to Probate Code §8573 and Cal. Rule of Court 2.200. The Court may require clarification. <p>Note: On 4-28-15, Ms. Amador filed a Notice of Change of Address for Kim Marie Gallo indicating an address in Brooklyn Park, Minnesota.</p>
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4-30-15
			Updates:
			Recommendation:
			File 4 - Sidam

Petitioner, Dale Stevens' First Partial Accounting

		<p>DALE STEVENS, as the purported, proper, successor Trustee of the Edith Lillian Mitchell Stevens Revocable Trust, is petitioner.</p> <p>Petitioner states Robert Stevens is indisputably the Trustee of the Sam C. Stevens Revocable Living Trust. Robert Stevens has produced and provided no discovery documents of any kind to present a more complete accounting. Dale Stevens has produced initially 269 pages of source documents, transaction receipts, paid utility statements, and similar source documents to Robert Stevens' attorney in accordance with the Court's most recent order in this case that the Parties engage in a mutual disclosure of documents.</p> <p>Therefore Dale Stevens can only provide this "partial" accounting because Robert Stevens is not observing the current Order of the Court nor administering the Sam C. Stevens Revocable Trust in accordance with the Code.</p> <p>The Petition for Instructions that initiated these proceedings asked for instructions and findings from the Court. The Court has yet to rule upon those three fundamental, foundational facts, which must be decided by Findings of the Court, before any actual attempt at reconciliation between the two Trusts can realistically be envisioned.</p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/14/15.</p> <ol style="list-style-type: none"> 1. The accounting does not comply with Probate Code §1060 et seq. 2. Need Notice of Hearing. 3. Need proof of service of the Notice of Hearing on all interested parties. 4. Need Order. 	
<p>Cont. from 010515, 012715, 031715, 041415</p>				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			X
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 4/30/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7A - Stevens</p>		

7A Edith Lillian Mitchell Stevens Rev. Liv. Trust Case No. 13CEPR00943

The three fundamental issues (for which Instructions were sought by Petitioner) are set forth in the Petition for Instructions, as follows:

1. An adjudication, Finding, and Instruction from the Court that, under operation [the first paragraph of Section VIII] the Third Trust Amendment Dated February 11, 2008, Petitioner Clarence Dale Stevens is confirmed as the due, proper and only Successor Trustee of THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended on May 4, 2007, as additionally amended on May 9, 2007, and as further Amended on February 11, 2008.
2. An adjudication, Finding, and Instruction from the Court that the Third Trust Amendment of THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended on May 4, 2007, as additionally amended on May 9, 2007, and as further Amended on February 11, 2008 is in full force and effect.
3. An adjudication, Finding, and Instruction from the Court that the Third Trust Amendment of the THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as amended, controls and instructs the Petitioner/Successor Trustee how the Trust Estate contained within THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST dated November 2, 1983, as Amended, shall be distributed.

Attached to the Petition is Restated Operating Summaries of all rents received and all debts and expenses paid by the Petitioner, for the years 2012, 2013 and partially into 2014 for the various Trust parcels of real property he has been administering since Edith Stevens died in 2012.

There can be no financial reconciliation between the two Trusts until the Court adjudicates the three foundational issues set forth above.

The Second Amendment to the Trust and the Third Amendment to the Trust changes the distributive shares of the beneficiaries.

Respondent Robert Stevens, submits that the Second and Third Amendments should be declared invalid so that the entire two Trust Estates can be divided equally among the four beneficiaries.

Petitioner Dale Stevens submits that both the Second and Third Trust Amendments should be declared valid and operative – and until that happens, the Parties cannot move forward to resolution of this matter.

**Probate Status Hearing RE: Settlement and First Amended Petition for Instructions
and to Determine Entitlement**

		<p>Status Report filed on 1/20/15 filed by Donna Standard on behalf of her client ROBERT STEVENS states:</p> <p>On 11/2/1983, SAM and EDITH STEVENS created two trusts; one entitled the SAM C. STEVENS REVOCABLE TRUST and the other entitled THE EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST. At the time each party consented to the transfer of community property into each other's trust, which was designated to be divided among their children at the time of execution. There children were ROBERT DUANE STEVENS, BETTY LOU AMELINO, LARRY BRYAN STEVENS and CLARENCE DALE STEVENS all of whom are still living.</p> <p>SAM C. STEVENS died on 9/27/1997. EDITH STEVENS became the Successor Trustee of Sam's Trust.</p> <p>EDITH STEVENS thereafter purportedly amended her trust, after the death of SAM C. STEVENS, excluding almost entirely, all of her other children from taking as originally planned. There were only nominal payments to her other three children. Edith also purportedly changed her successor Trustee from ROBERT D. STEVENS to CLARENCE DALE STEVENS, however ROBERT STEVENS believes all of these changes were accomplished by the undue influence of CLARENCE DALE STEVENS, and further, Edith was not of sound mind at the time of the execution. Pursuant to her death certificate, Edith died on 3/12/12 from end stage dementia.</p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/30/15.</p> <p>Note: The Sam C. Stevens Trust is not before the court nor is the Edith Lillian Mitchell Stevens' Will before the court. If the parties want to have the court rule on the issues regarding the Sam C. Stevens Trust or the Edith Lillian Mitchell Stevens Will then separate proceedings will need to be commenced regarding those instruments.</p>
Cont. from 012715, 031715,			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 4/30/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7B - Stevens</p>	

Further, Edith executed so many different documents changing the terms of the Trust originally executed, that her intent for disposition of her estate is not clear. Edith also executed a Will, after all of the amendments, which has been purportedly denied by her in an alleged writing created by **CLARENCE DALE STEVENS** after staying with her son Larry. The Will purportedly divided her estate equally between her children again, as was originally contained in the Trust document.

The issue of the validity of any amendments executed by Edith is the primary focus of this proceeding, as well as the validity of a Will executed by Edith after the execution of the purported amendments.

On 11/11/14, the parties appeared for a Mandatory Settlement Conference. The conference was not held due to the fact that **CLARENCE DALE STEVENS** terminated the employment of his attorney Michael Karby and further because after the deposition of **CLARENCE DALE STEVENS** it was determined that additional discovery was necessary. **CLARENCE DALE STEVENS** was given an additional 60 days to obtain new counsel. A hearing was set for status on 1/27/15.

CLARENCE DALE STEVENS has not obtained new legal counsel. **CLARENCE DALE STEVENS** is precluded from acting as his own attorney as he is acting as the Trustee of the **EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST** and claims to be the valid Trustee pursuant to a third amendment to the Trust, executed at a time when **CLARENCE DALE STEVENS** was care giving for Edith and she was suffering dementia.

Objector/Beneficiary, **ROBERT STEVENS** is prepared and ready for trial in this matter. **ROBERT STEVENS** has made several proposals for settlement in this matter, none of which have been agreed to by **CLARENCE DALE STEVENS**.

Accountings have been filed, however, neither party is in a position to prepare full accountings, until there is a determination as to who is the proper Trustee of the **EDITH LILLIAN MITCHELL STEVENS REVOCABLE LIVING TRUST**.

The matter of the validity of the Trust documents and/or her Will needs to be resolved before any further action in this proceeding can occur.

ROBERT STEVENS request this matter be set for trial, with the issue of the validity of the Trust and/or Will of **EDITH LILLIAN MITCHELL STEVENS** being bifurcated from any other issues.

This matter is completely stalled however, as long as **CLARENCE DALE STEVENS** is not represented by legal counsel.

Atty LeVan, Nancy (for Dale Stevens)
 Atty Standard, Donna (for Robert Stevens)

Probate Status Hearing RE: Repairs to the Two Properties

		<p>There is a dispute between Dale Stevens and Robert Stevens as to the validity of amendments to the Trust. Please see pages 15A and 15B.</p> <p>Minute order dated 3/17/15 set this status hearing re: Repairs to the Two Properties. Ms. Standard is to file a Status Report at least two court days prior to 4/14/15. The Court wants written proof of Kingsburg City's commitment to not act on the 940 Mariposa property.</p> <p>Former Status Report of Donna Standard, Attorney for Robert Stevens, filed on 4/10/15 states she has been in touch with Michael Nowlin, City Attorney for the City of Kingsburg, and he once again confirmed the forbearance until this matter is resolved, however he was unsure if any action had been taken and he is in the process of trying to contact the City Manager who will not be available until Monday, April 13.</p> <p>The property was red tagged back in January and to the knowledge of Mr. Robert Stevens and Ms. Standard no further action was necessary until this matter was resolved. Mr. Nowlin was not inclined to provide a letter to this effect until he can confirm with the City Manager that nothing else has occurred on the property.</p> <p>IF Dale Stevens desires to make repairs, Robert Stevens is more than willing to cooperate with said repairs. Dale Stevens has been collecting all the rents on the property prior to the red tag date.</p> <p>This matter needs to be set for trial so that it can be determined who is the proper trustee of the Edith Lillian Mitchell Stevens Trust, however, the property is owned by both trusts and at a minimum, one-half of all rents collected should have been paid to the Robert Stevens Estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/14/15. Minute order states Ms. Standard represents that the Mariposa property is not "red tagged: but the property is being worked on without a permit. The Court orders that no work is to be done without proper permits.</p> <p>1. Need current written status report. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 041415			
Aff.Sub.Wit.			
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Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting		<p>Reviewed by: KT</p> <p>Reviewed on: 4/30/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7C - Stevens</p>	
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

7C

		<p>CYNTHIA C. THOMAS and PAMELA J. THOMAS, daughters, were appointed Co-Conservators of the Person and Estate with bond of \$\$65,709.60 on 1-29-14. Bond was filed and Letters issued on 2-6-14.</p> <p>At the hearing on 1-29-14, the Court set this status hearing for the filing of the first account.</p> <p>Status Declaration of Jared C. Marshall filed 4-2-15 states his firm prepared the first account current and report of Co-Conservators, which was executed by the Co-Conservators on or around 3-3-15. Unfortunately, due to unforeseen circumstances, his firm has requested to withdraw as counsel of record for the Co-Conservators. These same circumstances, and his duties as officer of the court, preclude him from filing the existing first account current and report of the Co-Conservators on their behalf.</p> <p>A substitution of attorney was mailed to the Co-Conservators on 3-24-15, but has not yet been returned. Absent the return of the signed form or a material change in the existing circumstances, the firm intends to file a petition to withdraw as counsel of record and will file for attorney's fees separately.</p> <p>Mr. Marshall respectfully requests a continuance of 30 days to finalize withdrawal as counsel and to allow the Co-Conservators time to retain other counsel or otherwise finalize their first account in pro per.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: On 4-22-15, Attorney Kenton J. Klassen of Dowling Aaron Incorporated filed Notice of Motion and Motion to be Relieved as Counsel, which is set for hearing 6-2-15.</p> <p>1. Need first account pursuant to Probate Code §2620 or written status report pursuant to local rules.</p>
Cont from 040315			
Aff.Sub.Wit.			
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Duties/Supp			
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Video Receipt			
CI Report			
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Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: skc

Reviewed on: 4-30-15

Updates:

Recommendation:

File 8 - Coyle

Attorney
Mother
Father

Ruiz, Richard A. (for Rose Hess – Petitioner)
Weikel, Jennifer
Phillips, Robert

Status Hearing Re: Court Trial

		<p>ROSE HESS, Paternal Great-Grandmother, filed Petition for Appointment of Guardian of Minor on 4/15/14, and was appointed Temporary Guardian <i>ex parte</i> on 4/15/14.</p> <p>JENNIFER WEIKEL, Mother, filed an objection on 4/25/14.</p> <p>ROBERT PHILLIPS, Father, filed an objection on 4/30/14, but later signed a consent and waiver of notice, which was filed 7/18/14.</p> <p>At hearing on the temporary guardianship petition on 5/1/14, the matter was set for Court Trial. Ms. Hess' temporary guardianship letters were extended at further hearings.</p> <p>On 9/26/14, the Court terminated the temporary guardianship, made various orders, including visitation orders for Ms. Hess, and the matter was set for Court Trial on 11/18/14.</p> <p>At the continued Court Trial on 3/24/15, the Court set status hearing re reconsideration of temporary orders for 4/7/15 and also set this hearing for status re trial.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 4/21/15</p> <p>Note: On 3/27/15, Ms. Hess filed a new temporary guardianship petition, which was heard on 4/7/15 and continued to 5/5/15. See Page B.</p>
Cont. from 042115			
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Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 4/30/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 - Phillips</p>	

9B Phillips, Paris (GUARD/P)**Case No. 14CPER00351****Atty Ruiz, Richard A. (for Rose Hess – Paternal Great-Grandmother – Petitioner)****Atty Phillips, Robert (Pro Per – Father)****Atty Weikel, Jennifer (Pro Per – Mother – Objector)****Petition for Appointment of Temporary Guardian**

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 040715			Note: Ms. Hess' original petition for guardianship filed 4/15/14 remains outstanding. The most recent visitation order is set forth in Order After Hearing filed 10/17/14.	
<input type="checkbox"/>	Aff.Sub.Wit.			The following issue remains noted for reference: 1. Although Robert D. Phillips (Father) signed consent and waived notice in connection with ongoing proceedings and trial, the Court may require personal service regarding this <u>new</u> temporary petition pursuant to Probate Code §2250(e).
<input type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
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<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/30/14	
			Updates:	
			Recommendation:	
			File 27B - Phillips	

9B

10 Vincent Dusan (GUARD/P)**Case No. 14CEPR00425**

Guardian: Adolph J. Ceredi, III (pro per)

Guardian: Mary Blajos (pro per)

Probate Status Hearing re: Visitation Issues

		ADOLPH J. CEREDI, III , maternal uncle, and MARY BLAJOS , maternal aunt, were appointed guardians on 3/25/15. Father: JACOB DUSAN, JR. Mother: JENNIFER E. MATHIS – deceased. Minute order dated 3/25/15 states the Court orders the court investigator to re-interview the parties and provide an updated report as to the issue of unsupervised visitation/overnight visits with Jacob Dusan, Jr. Court Investigator Report filed on 4/28/15	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	Video Receipt		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: KT Reviewed on: 5/1/15 Updates: Recommendation: File 10 - Dusan	

Report of Sale and Petition for Order Confirming Sale of Real Property

DOD: 7/16/14		<p>VICKI LYNN JONES, Administrator with Will Annexed, with Limited IAEA and Bond of \$160,000.00, is Petitioner.</p> <p>Sale price: \$138,000.00 Overbid: \$145,400.00</p> <p>Appraisal: \$150,000.00</p> <p>Property: 3153 W. Holland Ave. Fresno, CA 93722</p> <p>Publication: N/A (sale authorized by will)</p> <p>Buyers: Makhan Singh and Amarjit K. Sodi, Husband and Wife, as Community Property</p> <p>Broker: 6% or \$8,280 to be split one-half each to Realty Concepts, Ltd, and Guarantee Real Estate.</p> <p>Property sold in AS IS condition. Seller to pay for Natural Hazard Zone Disclosure Report, Documentary Transfer Tax, and Title Insurance. Seller to pay for Smoke Alarm and Carbon Monoxide Device installation and water heater bracing, if required. Escrow expenses divided equally between buyer and seller.</p> <p>Petitioner requests to deposit net proceeds into a blocked account and continue with the existing bond amount of \$160,000.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Court will set a status hearing for the filing of the receipt for blocked account as follows:</p> <ul style="list-style-type: none"> Tuesday, June 23, 2015 <p>If the receipt is filed, the status hearing will be taken off calendar.</p>
	Aff.Sub.Wit.		
✓	Verified		
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	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
✓	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 4/30/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Carmody</p>	

NEEDS/PROBLEMS/COMMENTS:

Reviewed by: skc

Reviewed on: 4/30/15

Updates:**Recommendation:**

File 15 - Serrato

13 Rose Rodriguez (CONS/PE)**Case No. 14CEPR00994****Atty Krbechek, Randolph (for Dennis Rodriguez)****Atty McFarland, Pamela J (for Petitioner Maxine Rodriguez)****Atty Knudson, David N. (court appointed for Conservatee)****First Amended Petition for Appointment of Probate Conservator of the Person & Estate**

		TEMPORARY OF THE PERSON ONLY EXPIRES 5/5/15 MAXINE RODRIGUEZ , daughter, is petitioner Please see petition for details. Court Investigator Report filed on 1/7/15.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 12/18/14. Voting rights affected need minute order. 1. Capacity Declaration filed on 3/24/15 is incomplete. It does not state the name of the proposed conservatee at #4.
Cont. from 021015, 021015, 031715, 040715			
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: KT
Reviewed on: 4/30/15
Updates:
Recommendation:
File 13 - Rodriguez

Probate Status Hearing RE: Accounting of Dana Kahler and Waivers of Bond

DOD: 01/17/13		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>First and Final Account and Report of Former Trustee filed 4/22/15 is set for hearing on 6/8/15.</p>
Cont. from 030315, 041415		
Aff.Sub.Wit.		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 4/30/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Kasabian</p>

Age:			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> I&A filed 1/12/15
DOD:			
Cont. from			
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<input type="checkbox"/>	Inventory	<input type="checkbox"/>	
<input type="checkbox"/>	PTC	<input type="checkbox"/>	
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>	
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>	
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<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>	
<input type="checkbox"/>	Conf. Screen	<input type="checkbox"/>	
<input type="checkbox"/>	Letters	<input type="checkbox"/>	
<input type="checkbox"/>	Duties/Supp	<input type="checkbox"/>	
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<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>	
<input type="checkbox"/>	CI Report	<input type="checkbox"/>	
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<input type="checkbox"/>	Order	<input type="checkbox"/>	
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>	
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>	
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>	
<input type="checkbox"/>	Citation	<input type="checkbox"/>	
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>	
Reviewed by: skc			
Reviewed on: 4/30/15			
Updates:			
Recommendation:			
File 15 - Ragsdale			

DOD: 8/30/14	KAREN WARD , Sister, was appointed Administrator with Full IAEA without bond on 1/6/15. Letters issued 1/13/15.	NEEDS/PROBLEMS/COMMENTS:
	At hearing on 1/6/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	1. Need Inventory and Appraisal pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 4/30/15
		Updates:
		Recommendation:
		File 16 - Oda

Guardian: Deborah Rose Rocha (pro per)

Guardian: Keith Mario Rocha (pro per)

Probate Status Hearing re: Counseling and School.

		KEITH ROCHA and DEBORAH ROCHA , maternal uncle and aunt, were appointed guardians on 3/17/15. Father: ERNESTO DELATORRE Mother: JENNIFER CORDOVA Minute Order dated 3/17/15 states the Court orders the Guardians to enroll the minor in counselling at Kaiser and to bring a report from the Counselor detailing the number of sessions that have occurred and how they are going. The Court also wants a report regarding the minor's progress in school. Parties are to mutually agree to visitation with Mr. Delatorre. Confidential Medical filed 4/28/15. Declaration re: School Info filed on 4/28/15	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
Aff.Sub.Wit.			
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Inventory			
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Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT Reviewed on: 5/1/15 Updates: Recommendation: File 17 - Cordova	

18 Anna Mae Candler (Det. Succ.)
 Atty Isaac L. Candler (Pro Per – Son – Petitioner)
 Atty Carl A. Candler (Pro Per – Son – Petitioner)
 Atty Devlyn Candler (Pro Per – Daughter – Petitioner)

Case No. 15CEPR00116

Amended Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 2/14/07		ISAAC L. CANDLER, CARL A. CANDLER, and DEVLYN CANDLER , adult children of the decedent, are Petitioners. 40 days since DOD No other proceedings I&A: \$150,000.00 (real property located at 2345 South Lily, Fresno, 93706) Decedent died intestate Petitioners state all siblings are claiming 100% interest in the estate.	NEEDS/PROBLEMS/COMMENTS: 1. Petition is blank at #9a(1) as to whether the decedent was divorced or never married, or whether the decedent's spouse was deceased. If the decedent's spouse is deceased, need date of death. Local Rule 7.1.1.D. 2. Need Attachment 11, which should provide the <u>legal description</u> of the real property plus statement of <u>decedent's interest</u> in the property. Did the decedent own a 100% interest in the property? 3. The box for personal property is checked at #11, but there is no personal property included in the I&A. Need clarification. <u>Note:</u> It appears that if the three petitioners are the decedent's only children, and the decedent was not survived by a spouse, then distribution would be in one-third undivided interests each to Isaac Candler, Carl Candler, and Devlyn Candler.
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Reviewed by: skc Reviewed on: 4/30/15 Updates: Recommendation: File 25 - Candler			

Petitioner: Christian Torres (pro per)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			<u>Temporary Expires 5/5/15</u>		NEEDS/PROBLEMS/COMMENTS:
			CHRISTIAN TORRES, brother, is Petitioner.		
			Please see petition for details.		
			Objection to Guardianship filed 02/26/15 by Martin Torres (father)		
Cont. from			Court Investigator Report filed on 4/26/15		
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
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✓	Notice of Hrg				
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	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
					Reviewed by: KT
					Reviewed on: 5/4/15
					Updates:
					Recommendation:
					File 20A - Torres

20A

Petitioner: Ruben Luna (pro per)

Petitioner: Arcelia Luna (pro per)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		RUBEN LUNA and ARCELIA LUNA , maternal grandparents, are Petitioners. Please see petition for details. Objection to Guardianship filed 02/26/15 by Martin Torres (father). Court Investigator Report filed on 4/26/15.	NEEDS/PROBLEMS/COMMENTS: 1. Petition does not include the child information attachment, as required.	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
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	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: KT Reviewed on: 5/4/15 Updates: Recommendation: File 20B - Torres	

20B

		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR.</u> <u>REQUEST FOR DISMISSAL</u> <u>ENTERED 05/01/2015</u>
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<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: LV
		Reviewed on: 05/04/2015
		Updates:
		Recommendation:
		File 21 - Lucero

22 Gilbert Justin Gonzales, Jr. (GUARD/P) Case No. 15CEPR00208

Petitioner Venegas Gonzales, Melisa Edit (Pro Per – Paternal Aunt)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 5 months	<u>TEMPORARY EXPIRES 05/05/15</u>	NEEDS/PROBLEMS/COMMENTS:
	MELISA VENEGAS GONZALES , paternal aunt, is Petitioner.	1. Need Notice of Hearing.
	<u>Please see petition for details</u>	2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none">• Paternal Grandparents (Not Listed)• Maternal Grandparents (Not Listed)
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
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<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	n/a	
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<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 05/04/2015
		Updates:
		Recommendation:
		File 22 - Gonzales

DOD: 03/23/2014		<p>DAVID HAYSLIP, son is petitioner and requests appointment as Administrator without bond.</p> <p>Full IAEA - ?</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: The Fresno Bee</p> <p><u>Estimated value of the Estate:</u> Personal property - \$48,000.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Affidavit of Publication. 2. Need Waiver of Bond on Mandatory Judicial Council Form DE-142. 3. Need Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147. 4. Need Confidential Supplement to Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S. 5. Need Order. 6. Need Letters. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Tuesday, 09/08/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Tuesday, 07/05/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
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<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order x		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LV</p> <p>Reviewed on: 05/04/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 23 - Hayslip</p>	

DOD: 05/02/14	WALTER C. LASKO, JR. , son/named alternate executor without bond, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
	Full IAEA – OK		1. The 1981 will is not self-proving. Need Affidavit of Subscribing Witness for the 1981 will.
Cont. from	Will dated 01/08/81		
<input type="checkbox"/> Aff.Sub.Wit.	<input checked="" type="checkbox"/>	x	2. The will dated 01/08/81 does not appear to be the last will of the decedent. Will dated 08/06/12 was deposited with the Court on 04/01/15 and revokes all previous wills. The terms of the 2012 will are different than the 1981 will, including the nomination of personal representative. Amended Petition for Probate may be necessary.
<input checked="" type="checkbox"/> Verified	<input type="checkbox"/>		
<input type="checkbox"/> Inventory	<input type="checkbox"/>		Residence: Fresno Publication: The Business Journal
<input type="checkbox"/> PTC	<input type="checkbox"/>		
<input type="checkbox"/> Not.Cred.	<input type="checkbox"/>		Estimated Value of the Estate: Personal property - \$ 5,000.00 Real property - 175,000.00 Total - \$180,000.00
<input checked="" type="checkbox"/> Notice of Hrg	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Aff.Mail	<input type="checkbox"/>	w/	Probate Referee: STEVEN DIEBERT
<input checked="" type="checkbox"/> Aff.Pub.	<input type="checkbox"/>		
<input type="checkbox"/> Sp.Ntc.	<input type="checkbox"/>		Note: If Petition is granted, the following status hearings will be set:
<input type="checkbox"/> Pers.Serv.	<input type="checkbox"/>		
<input type="checkbox"/> Conf. Screen	<input type="checkbox"/>		<ul style="list-style-type: none"> Tuesday, October 6, 2015 at 9:00am in Dept. 303 for filing of the Inventory & Appraisal; Tuesday, July 5, 2016 at 9:00am in Dept. 303 for filing of the Account/Petition for Distribution
<input checked="" type="checkbox"/> Letters	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Duties/Supp	<input type="checkbox"/>		Reviewed by: JF
<input type="checkbox"/> Objections	<input type="checkbox"/>		
<input type="checkbox"/> Video Receipt	<input type="checkbox"/>		Reviewed on: 05/04/15
<input type="checkbox"/> CI Report	<input type="checkbox"/>		
<input type="checkbox"/> 9202	<input type="checkbox"/>		Updates:
<input checked="" type="checkbox"/> Order	<input type="checkbox"/>		
<input type="checkbox"/> Aff. Posting	<input type="checkbox"/>		Recommendation:
<input type="checkbox"/> Status Rpt	<input type="checkbox"/>		
<input type="checkbox"/> UCCJEA	<input type="checkbox"/>		File 24 - Lasko
<input type="checkbox"/> Citation	<input type="checkbox"/>		
<input type="checkbox"/> FTB Notice	<input type="checkbox"/>		

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450).

DOD: 2/1/15			JANET S. HERMAN , Spouse and named Executor without bond, is Petitioner Full IAEA – ok Will dated 9/5/14 Residence: Fresno Publication: Business Journal Estimated value of estate: Personal property: \$800,000.00 Annual income: \$40,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: Note: The Court will set status hearings as follows: <ul style="list-style-type: none"> Tues, Oct. 6, 2015 for filing the Inventory and Appraisal Tues Aug. 2, 2016 for filing the first account or petition for final distribution. If the proper items are on file prior to the status hearing dates pursuant to Local Rule 7.5, the status hearings may be taken off calendar.
	Aff.Sub.Wit.	s/p		
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w		
✓	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 5/4/15	
			Updates:	
			Recommendation: SUBMITTED	
			File 25 - Herman	

Attorney

Moore, Susan L. (for Janet S. Herman – Petitioner)

Petition to Determine Assets of Decedent as Property of an Existing Trust

Marc Herman DOD: 2/1/15		JANET S. HERMAN , Surviving Settlor and sole surviving Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		<p>Petitioner states Marc Herman and Janet S. Herman executed an inter vivos Declaration of Trust on 9/5/14 and assigned, transferred and delivered to the trustee such property described on Schedule A (attached) including certain bank and investment accounts and other investments as described therein.</p> <p>However, Marc Herman died prior to executing the necessary transfer documents to the assets identified in Exhibit "C" which were intended to be held in the trust, and on the date of his death, 2/1/15, Marc Herman was the vested owner of the assets described in Exhibit "C."</p> <p>Petitioner states the intent to hold the assets described in Exhibit "C" in the trust is evidenced by the fact that the assets were described on the Schedule of Assets attached to the Trust.</p> <p>Petitioner cites <i>Estate of Heggstad</i>. (See Points and Authorities.)</p> <p>Petitioner prays for an order adjudging that:</p> <ol style="list-style-type: none"> 1. Marc Herman died on 2/1/15, a resident of Fresno County, CA, as the vested owner of the assets described in Exhibit "C;" 2. Marc Herman and Janet S. Herman, during their lifetimes, created a revocable inter vivos living trust by Declaration of Trust dated 9/5/14, as the Settlers and Trustees; 3. Janet S. Herman became the sole surviving Trustee upon the death of Marc Herman; 4. That despite the vesting of the assets described in Exhibit "C", the assets are included as a part of the trust estate and now owned by Janet S. Herman, as Trustee of the Marc Herman and Janet S. Herman Living Trust u/d/t/ dated 9/5/14; and 5. Such further orders as the Court deems appropriate. 	
	Aff.Sub.Wit.		Reviewed by: skc Reviewed on: 5/4/15 Updates: Recommendation: File 26 - Herman
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Petitioner

Perez, Desiree (pro per – maternal aunt)

Petitioner

Salarzon, Joseph D. (pro per – maternal uncle)

Petition - Appoint Temporary Guardian

Age: 5		GENERAL HEARING: 06/25/15		NEEDS/PROBLEMS/COMMENTS:	
		DESIREE PEREZ and JOSEPH SALARZON , maternal aunt and uncle, are Petitioners.		1. Need <i>Notice of Hearing</i> .	
		Father: ANDREW MESA		2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence</i> for:	
Cont. from		Mother: ROSALINDA PEREZ		a. Andrew Mesa (father)	
	Aff.Sub.Wit.			b. Rosalinda Perez (mother)	
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg	x	Paternal grandfather: DECEASED Paternal grandmother: UNKNOWN Maternal grandfather: ALFRED PEREZ, SR. Maternal grandmother: DECEASED		
	Aff.Mail		Petitioners state [see Petition for details].		
	Aff.Pub.		Objection to Guardianship filed 04/29/15 by Rosalinda Perez and Andrew Mesa (parents) states: [see file for details].		
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
✓	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 05/04/15	
				Updates:	
				Recommendation:	
				File 28 –Perez	